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ABSTRACT

LeaderLab, a leadership development program, encourages and enables leaders to take more effective actions. In developing content and structure, several instructional principles are important: realism, simplicity, relevance, operationalism, holism, and intervention over time. The program content falls into four categories: (1) challenges faced by executives; (2) competencies to deal with the challenges; (3) skills and knowledge that help each participant; and (4) the information and experience generated. Leaders face several challenges today, such as dealing with rapid and substantive change, managing diversity of people and views, and building the future through a shared sense of purpose. Five overlapping competencies needed to address the challenges are as follows: dealing effectively with interpersonal relationships, behaving in terms of systems, approaching decision-making from the standpoint of trade-offs, acting with flexibility, and coping with disequilibrium. The third content area focuses on two aspects of how leaders develop themselves: learning to learn and clarifying one's sense of purpose. The seven elements of the LeaderLab program are as follows: multiple sessions; pre- and post-course contact; process advisor--individual program tailoring; change partners; diversity of participants and trainers; classroom activities; and instruments. (A model diagram and conclusions are included. The bibliography contains 51 references.) (NLA)

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Training for Action:
A New Approach to Executive Development

by
Robert M. Burnside
Victoria A. Guthrie

Defining the purpose, principles, content, and structure of an action-oriented leadership program

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March 1992

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Introduction

Because leadership is multidimensional, and its development can thus be approached from numerous perspectives, the Center recently added a major new program to its range of leadership-development courses. In the summer of 1989 the authors, along with Leonard Sayles, began developing *LeaderLab.*® We came to this task with different backgrounds: as a researcher who has studied leadership in detail (Sayles); a former executive with intensive line experience (Burnside); and a veteran trainer from the Center's Leadership Development Program (Guthrie). A year later we put the new program through two pilot runs, and in 1991 it began regular operation.

This report will discuss some key issues that we encountered in creating LeaderLab—issues that we believe should be of interest to anyone, particularly human-resource professionals, concerned with leadership-development programs. Specifically, we will consider what the purpose of the next generation of such programs should be, what training principles are appropriate for them, and what content and structure would be best for them. We will then look at the implications of the issues for leadership development in the future. Throughout we will present examples drawn from our experience.

We would like to begin by establishing the context for our remarks. There are a number of values underlying the training programs offered by the Center, among which are: that everyone has the potential to develop, and helping people develop through training programs is a worthwhile activity; that leading is primarily a process of human interaction, and training should therefore concentrate on the human side of leadership; that leaders should seek to develop the people they are leading and work for the good of all; that leadership should be creative and keep up with the changing world; that training should address the leader in the workplace, family, and community; and that each individual should be free to define his or her own values and development process and to choose how far to go in it.

All of the thinking about development that follows is informed by these values.

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Establishing Program Purpose

There are today dozens of programs that share the aim of producing better leaders. Even a quick survey of these will discover common instruments, methodologies, and content areas. How can one make sense of this myriad of programs?

One good way is to look at purpose, thereby determining the dimension (or dimensions) of leadership on which a program concentrates. The Center's Leadership Development Program (LDP), for instance, aims "to help people be happier and more productive in their work and personal lives, and to help them lead others to do the same." The program does this by emphasizing the development of self-awareness, giving each participant as accurate as possible an understanding of his or her strengths and weaknesses in relating to others. Participants gain self-awareness by means of the extensive feedback that they receive during the program—from people they work with (through rating instruments that are administered prior to the program), from staff psychologists, and from other people taking part in the program. Various leadership models are reviewed to acquaint them with alternative behaviors. They are also encouraged to review their satisfaction with their lives as a whole—work, family, and community. This lays the basis for them to change their behavior, if they choose to. At the end of the session they set goals for the behaviors they wish to change.

The focus of LDP is thus on the leader as an individual—on the personal dimension of leadership. It recognizes that leadership is primarily a process of human interaction and that to improve it, a leader must begin with objective self-awareness. Most development programs today focus on this dimension—although with 181 runs serving 3,636 participants in 1990, LDP is probably the largest program of this kind.

In creating LeaderLab we concentrated on an additional dimension—action. We chose to do this basically for two reasons: First, we have often heard training and development managers remark that awareness in itself isn't enough, that training programs need to help the individual translate self-awareness into effective and sustained action. Second, it is our observation that the

challenges of the next ten to twenty years are so serious that they could virtually paralyze leaders. Leaders need help, and we wanted to create a program that would provide resources to the individual who is ready to act. Thus, the purpose of LeaderLab is "to encourage and enable leaders to take more effective actions in their leadership situations."

Looking at purpose helps us see the difference between the two programs (and between the type of program, like LDP, which is most common today and a newer type that also needs to be made available). Even though both involve self-awareness and action and share some content ideas and instruments, we see them as distinct. In fact the two taken together can help us establish a kind of working definition of leadership development.

Based on our interactions over the years with LDP participants, we are convinced that a crucial aspect of one's becoming a better leader is an objective self-awareness of one's strengths and weaknesses, especially as others perceive them. This is essentially an inner process but it usually leads to an outer process: the attempt to change one's behavior to eliminate or compensate for weaknesses. For instance, "I am perceived as abrasive; I will be more sensitive to my subordinates' feelings." Unfortunately, studies of the impact of Center programs (for instance, the study of Looking Glass that Ellen Van Velsor is currently preparing for publication) show that moving from the intention to change a behavior to actually changing it is difficult, and sustaining a change is even more difficult. Leadership development, therefore, can be seen as a process of gaining increased self-awareness, planning and carrying out more effective actions, and seeking ways of sustaining the development over time.

The issues involved with creating a program that focuses on carrying out more effective actions and sustaining the development process over time are the subject of the remainder of this paper.

Training Principles

In developing content and structure, we believe that you must keep a few basic instructional principles constantly in mind. Some of these are appropriate for any leadership training course (realism, simplicity, and relevance), and some are, we think, especially appropriate for a program that aims to enable leaders to act more effectively and to sustain their development (operationalism, holism, and intervention over time).

Realism

After reviewing with Leonard Sayles the ways leadership has been taught historically, we were convinced that the program must be realistic about how complex the activity of leading is. Leadership has sometimes been taught in terms of simplistic, two-factor models. These models have a limited usefulness. Consider, for example, the model that suggests that an effective leader should delegate authority (factor one) according to the maturity of the employee (factor two). This is helpful insofar as it helps one understand two of the basic issues involved in delegation, but in practice delegation involves many more factors than this. If advanced development is to occur, training programs must make the leader face the real complexity of factors that are part of every leadership action.

Simplicity

At the same time, the program cannot overwhelm participants with complexity. Making material simple but not simplistic takes effort. As we struggled to do this for LeaderLab, we kept in mind a statement that Max DePree, in his 1989 book *Leadership Is An Art*, attributes to Justice Oliver Wendell Holmes: "I would not give a fig for the simplicity this side of complexity, but I would give my life for the simplicity on the other side of complexity" (page 18). Programs must not take the approach indicated in the old saying, "I

didn't have the time to write you a short letter, so I wrote you a long one."

Relevance

It is crucial to constantly ask whether the content of the program is relevant to its goal. For LeaderLab the question was, "Can the content really help leaders act more effectively in their specific leadership situations?" We were thus able to discard "nice-to-know" but not helpful content and to identify areas that were needed but not yet offered by leadership programs.

Operationalism

When the goal of a program is to enable leaders to take more effective actions, its content must be "doable." One way to accomplish this is to present it in behavioral rather than abstract terms. For example, we think it is better to talk about the activity of leading than about the abstract concept *leadership*. Even talking about *leaders* can retard action because this term has so much evaluative baggage associated with it (people sometimes think that in order to be a leader they must be great, a Gandhi or a Churchill). Focusing on action, on leading as an activity, can help ensure that everything in a course lends itself to being put into practice.

Holism

We are convinced that training must be conducted in terms of the whole person: intellect, emotions, and behavior (which we refer to in LeaderLab as head, heart, and feet). In our opinion, most Western-based leadership training focuses only on the head of the leader—assuming that if one intellectually understands what is needed, then action will follow and emotion will accept it. With this approach, if one wants to learn to ride a bicycle, one would review the history of bicycle-riding, study the great bicycle riders of the

past, read case studies of what bicycle-riding is like, and then, and only then, try riding the bicycle. We believe that the demands facing leaders today are so overwhelming that, in addition to giving them an understanding of what they need to do, we must enable them to have their feelings and values strongly engaged in their actions, and we must make it possible for them to try out the actual physical behavior involved. In a holistic program, then, one would learn to ride a bicycle by riding one, and the intellectual understanding of what riding is like would be matched by asking such questions as, "Is bike riding important in my situation?" and "How do I feel about doing it?"

Intervention Over Time

We believe that lasting behavioral change requires intervention over time. In our view, breaking old habits and developing new ones requires not only an intellectual commitment but also the engagement of the emotions and a clear action plan. This takes time because it is difficult to address all these dimensions at once. Intervention over time also allows a full adult learning cycle to occur (that is, planning, doing, and reflecting; see the section on "Learning to learn," p. 14).

Program Content

Given the principles described above, what information and ideas should participants be provided with, what skills and capacities should they be helped to acquire? In other words, what should the content of a program that focuses on action be? The content we developed for LeaderLab basically falls into four categories: (1) the significant generic challenges faced by executives today; (2) the competencies necessary to deal with these, or any, challenges; (3) the skills and knowledge that help each participant to understand his or her specific leadership situation and to take action; and (4) the information and experience that each participant generates by means of number 3.

Numbers 1 through 3 could be considered general content—that is, they are the same for every participant. Number 4, developed in the course of the program, is unique for each person. For obvious reasons, we will only be discussing 1 through 3 in this paper.

Challenges

The ability of leaders to take action today can be enhanced by their having a clear understanding of the challenges that they face. This is not easy, since at present leaders are often overwhelmed by challenges—almost paralyzed by them.

As a part of our preparation for LeaderLab we surveyed more than one hundred leaders from Fortune 500 companies about what they thought the most important challenges of the next ten to twenty years would be. We used their responses, as well as our own reading of the current situation, to develop the following.

We believe current leadership challenges can be understood as making up three distinct but interrelated categories: dealing with rapid and substantive change, managing diversity of people and views, and building the future through a shared sense of purpose.

Dealing with rapid and substantive change. The increasing rate of change was well documented in the eighties, and

some work has already been done on helping leaders manage rather than resist it. There is another aspect of change that is at least as disturbing as is its increased rate: It is becoming more radical. Recently we were worried about whether our institutions could continue to increase profits; now we are worried about the viability of many of our businesses. Recently we were surprised by the conciliatory note in the rhetoric coming out of the U.S.S.R.; now we have witnessed the political dissolution of that country. Leaders must have the capacity to deal with both rapid change and substantive change.

Managing diversity of people and views. Much has already been written and discussed about the increasing diversity of the work force in the United States. The majority of new workers entering the work force in the years before the turn of the century will be from groups other than the traditional white male majority (*Workforce 2000*, p. 95). In addition, the global nature of business is bringing more national and cultural differences to the workplace. Increasing diversity, however, is not just an ethnic or gender issue. It is a cognitive one as well. Workers today are more varied in the ways that they understand and act in the world than those of even a generation ago. Thus, leaders today must learn how to deal effectively with people that have very different values and worldviews.

Building the future through a shared sense of purpose. There were many names for the third challenge in the survey data we collected. It was called, for instance, "the need for team-building," "the need for convincing others of the value of working for organizational goals," and "the need for visioning." What we feel that all these are trying to express is a situation where people do not share a sense of purpose, and consequently find it impossible even to determine what to do, much less to do it. Leaders must engage people in the search for stable common ground that provides the basis for action.

Additional considerations. There are of course other challenges. There is one which should go without saying but which our survey indicated most training programs do not address: the challenge of the individual's situation. We think it is essential for a development program to facilitate the individual's exploration and identification of the crucial challenges in his or her particular

situation, and to relate these fine points to the program's content—to bring the generic concepts to life in the specific reality.

These are the key challenges of our times, but they are not necessarily permanent. In 1980 we would likely have identified different ones, such as building the concept of quality in the workplace or realizing participative management. These issues, however, have already received a good amount of attention, so we did not include them in our key challenges of the nineties, even though there is still much work to be done in organizations around them. We expect the challenges currently identified will continue to evolve over time, and that any development course must seek to update its content as fresh challenges emerge.

Also, we would like to add a note on the way we characterize the challenges. The concept of challenge can be a slippery one because it is used in two ways. In one the challenge is characterized as a force or condition that one faces (a storm is a challenge for a sailor). In the other it is characterized as the necessary response to a force or condition (the challenge is responding successfully to the storm). Because we think there is a need for development programs that focus on action, we think the second approach is best. We could have identified our challenges as "rapid and substantive change," "diversity of people and views," and "lack of a shared sense of purpose"; instead we chose to call them "*dealing with* rapid and substantive change," "*managing* diversity of people and views," and "*building* the future through a shared sense of purpose." This brings the challenges closer to the competencies.

Competencies

The task of defining a comprehensive set of competencies that would enable the leader to act in the face of the above challenges was the hardest and most time-consuming work we did in developing LeaderLab. Our work, which was largely based on the extensive research and field experience of Leonard Sayles (see Sayles, 1989), began with our grouping together related behaviors that leaders are required to exhibit. In this way we originally established seventeen discrete clusters of behaviors.

This was clearly too much and too fragmentary. No leader could easily use such a list to help him or her act. We therefore spent considerable effort transforming our seventeen clusters into five comprehensive yet distinctive competencies: dealing effectively with interpersonal relationships, thinking and behaving in terms of systems, approaching decision-making from the standpoint of trade-offs, thinking and acting with flexibility, and maintaining emotional balance by coping with disequilibrium. These, we believe, can be thought of as a comprehensive behavioral overview of the tasks of a leader. They overlap because they are integrative by design, but each is distinct in focus.

Each competency has a cluster of particular skills (or sub-competencies) necessary to its proper enactment.

Dealing effectively with interpersonal relationships. The ability to deal well with people is a competency that is especially important if one is to meet the second and third challenges given above. It can be seen as involving three distinct skills: managing face-to-face interactions—that is, interacting with individuals in a way that builds trust, credibility, and the commitment of the other person to the goal at hand; managing system-wide interactions—that is, seeing the right people in the right order with the right frequency so that one's leadership tasks can be accomplished; and dealing with strangers—that is, effectively handling the differences between oneself and others. This third skill is the primary focus of our program at present, because of the current importance of the challenge of diversity. We teach that this skill involves acknowledging the differences between oneself and others, disclosing one's own values and beliefs, and encouraging others to disclose their values and beliefs; in this way it should be possible to find common ground to work on shared goals, and to problem-solve about how differences may be affecting the work.

Thus, the skill is *not* basically to learn how different groups think or behave but rather to learn how to deal with differences when relating interpersonally. Our program does of course touch on differences in individual personalities and gender, as well as among various occupational, functional, ethnic, and national cultural groups, but this is done so that participants may interact to effectively carry out their leadership role. Participants are encouraged

to explore and clarify their own values, to seek to remove their own prejudices and preconceptions, and to remain open to allowing those different from them to educate them about who they are and what they really value.

Thinking and behaving in terms of systems. Each organization is an organic whole. In other words, each is a system, made up of systems, the various elements of which—for instance, tasks, jobs, and departments, as well as people, controls, and technology—interact and are interdependent (see Sayles, 1989). Therefore, in our view, an important competency for leaders is the ability to take a systems perspective and to act accordingly.

When leading with a systems perspective, you see that there is no such thing as a minor change, that any change has effects on the whole organization. You also understand that what is often addressed as a people or morale problem may be primarily, or even completely, a technical problem—that is, job or task interrelationships may be out of alignment (see Sayles, 1990).

An important skill for this competency is the ability to build cultures that are congruent with the technical systems and which support the organization's long-range goals. This requires you, first, to identify the values underlying a culture by analysis of their tokens in symbols and behaviors and, second, to face the political realities of change.

In our view the systems competency is the primary one involved in the challenge of building the future through a shared sense of purpose (although all five competencies are required for successfully addressing this challenge).

The two competencies just described are, we believe, the most important ones for leaders today. As a memory aid, we liken these to the thumb and first finger of the hand: They are the pincers that allow one to grasp the situation. The other three competencies are like the other three fingers: They make it possible to take the situation fully in hand.

Approaching decision-making from the standpoint of trade-offs. Currently, much decision-making is approached in terms of simple maximizations (Which of the actions I'm considering would maximize profits?) or two-factor models (I can delay making a decision until I have better information, but then the

decision may come too late; or I can make a decision now, but, because I have incomplete information, I may make the wrong choice). Such approaches are very useful as a way to begin understanding the complexity of decision-making, but they will not be adequate for the great majority of situations that leaders face. We believe leaders must recognize that decisions always involve multiple trade-offs—competing points of view and conflicts of interest. Effective decision-making seeks to smoke out the conflict, to know before the decision is made what the alternatives are and if you are saying yes to something that you are saying no to something as well. This allows the leader to ground each decision in the actual situation (see Sayles, 1989, pp. 183-186).

One of the skills required to do this effectively is the ability to weigh accurately the ethical dilemmas you face in leading. Where exactly do you trade off your own interests with those of your group or organization? Facing these openly on a case-by-case basis increases your self-awareness of your own values and how congruent they are with the organization around you.

Thinking and acting with flexibility. Especially given the challenge of dealing with change, we think flexibility is crucial for leaders today. The skills required to do this are many. Leaders must be able to seek out and monitor new information and to test their current assumptions against the new data. They must be able to try new ways of doing things. They must have the capacity to redefine a problem when necessary. They must be able to change quickly in their actions—for instance, they must move from consoling an employee on a death in the family, to leading a kick-off meeting on a new product, to deciding the rug color in the hallway, to negotiating the price of the raw materials the company will use next year, all in the space of a morning. This requires the ability to moderate one's style of interaction to the need of the moment and the task at hand. In general, we believe that the actions and thinking of leaders today must be based on current needs and data, and that no rigid formula or set way of acting can be applied constantly.

Maintaining emotional balance by coping with disequilibrium. The leader's need for emotional competency is being increasingly recognized today (see, for instance, the Center's current research on the expansive personality of many general

managers—Kaplan, 1990, 1991a, 1991b). We believe that the task of leading is characterized more by things going wrong than things going right. Carefully laid plans go astray. People are uncooperative. Precisely designated tasks and techniques are misapplied, don't work as expected, or become unexpectedly outdated. Thus, the leader should expect to be frequently angry, frustrated, or otherwise out of balance emotionally—a condition we refer to as *disequilibrium*. It is, therefore, important that one have the ability to protect his or her emotional balance.

One skill necessary to do this is the ability to see conditions as realistically as possible. One can thus avoid the frustrations that come from unrealistic expectations.

Realistic expectations, however, are not enough. We teach that the leader must be aware of one's own emotions and the feelings of the others, acknowledge the effect of the emotions on behavior, and adapt one's behavior to bring about the desired result.

Finally, one must be aware of what is important to one's own emotional equilibrium, and actively build support or respite into one's situation. For instance, emotionally effective scheduling can be crucial. If a particular person is continually irritating, one shouldn't schedule a meeting with that individual before other emotionally challenging events such as a major departmental meeting.

Relationship of competencies. These five competencies overlap. Take any one and look into it and you eventually come to all the others. Yet each retains its focus. We believe that taken as a whole these five competencies provide a comprehensive overview of a leader's necessary activities. And successfully meeting each of the challenges requires all five competencies.

Self-development Through Understanding One's Own Leadership Situation

The third major area of content in the program focuses on how leaders develop themselves. We believe there are two major aspects of self-development: learning to learn; and clarifying one's sense of purpose.

Learning to learn. The importance of learning from experience is, and has been, the subject of much Center research. This work has shown that successful leaders tend to have had a broad variety of experiences; a variety of bosses; and both successes and failures in their careers. They typically learn much from these experiences, finding patterns or techniques that they can apply in the future (Lindsey, Homes, & McCall, 1987; McCall, Lombardo, & Morrison, 1988; Morrison, White, & Van Velsor, 1987).

As this research continues (Lombardo, Bunker, & Webb, in press), the inner processes that leaders go through in learning are being closely studied. It is a tentative finding, for instance, that successful executive learners tend not to be excuse-finders; they typically attack problems rather than avoid them. Also emerging from the research is an indication that the greatest potential learning occurs in situations that one finds personally most difficult—that is, when one goes against the grain of habitual practices. When a leader goes against the grain to try a new behavior, and then reflects on it, that person can learn more than when he or she simply repeats an already learned behavior.

We have taken ideas suggested by this Center research and blended them into traditional models for adult learning; participants use this information in a guided process to learn from their own experience.

Adult learning can be seen as a three-step process: planning to do something, doing it, and reflecting on the experience in order to learn from it. Then the process begins again: What has been learned is used to prepare a new plan of action, which is carried out and reflected on, and the process continues. A spiral of continued growth can be imagined as the cycle repeats.

We believe that learning from experience is so important that this content should be repeated in different parts of the program. In LeaderLab, for instance, it can be seen in the daily learning journal that participants keep and in the development of an action plan.

Having participants keep a daily learning journal is a way to focus attention on life experience as a source of learning. In it, each individual selects one event from the day's activities, records how he or she responded to it and why, and says what can be learned from the event. Over a short period of time the journal can thus provide an individual with themes or patterns of behavior that can

be useful in taking more effective actions in one's situation. Journalizing provides a personal map of one's response to events in his or her life. The goal is to have the participant adopt a frame of reference and build a habit of reflecting on his or her own daily experiences as the single most important source of data for improvement.

These journals are usually written, but we encourage participants to use whatever medium is most comfortable for them. Those who prefer computer entries to hand-written ones can use their computers. The key point is to keep the journal daily.

LeaderLab also includes this content in the action plan that each participant creates. In this plan, going against the grain is a part of what one needs to accomplish. (As will be seen in the section on program structure below, the program itself follows a learning model: There are two sessions; in the first the participant prepares a plan of action; between sessions the plan is acted on; and in the second session the experience of carrying the plan out is reflected upon.)

Clarifying one's sense of purpose. The challenges we face today make leading difficult. And learning from experience, especially if one is going against the grain, is not easy. In order to respond to these general and personal conditions, strong motivation is required. We believe leaders should be assisted in discovering why it is important to take on the challenges and persevere. In LeaderLab we try to help each participant become more consciously aware of a sense of purpose in his or her leadership. We teach that two factors feed one's sense of purpose: On one hand, each person must identify the ideal towards which one is striving in his or her leadership (this is an internal issue); on the other hand, each person must identify what his or her current leadership situation requires (this is an external issue). The two together round out one's sense of purpose.

Gaining an idea of one's sense of purpose can be done in many ways. For instance the clarification of one's inner ideal can be accomplished by studying one's own life. By analyzing the events and people one has known, studying what one has accomplished, and reviewing how typical tasks have been handled, one can better determine what he or she wishes to accomplish in the future.

In addition, a program can also help participants understand purpose by repeatedly emphasizing that they must analyze their own leadership situations and what this requires of them, and by conducting a guided imagery process that enables each individual to develop a tangible picture of the future outcome of his or her leadership.

Our belief is that one's sense of purpose is in the individual's domain. No judgment is made in LeaderLab about anyone's goals. The program does, however, require that individuals clarify what their purpose is and practice sharing this with the others in the program and their colleagues back home. We consider developing a sense of purpose to be an activity intrinsically worthy in itself, done for its own sake and not for external rewards or because of external requirements.

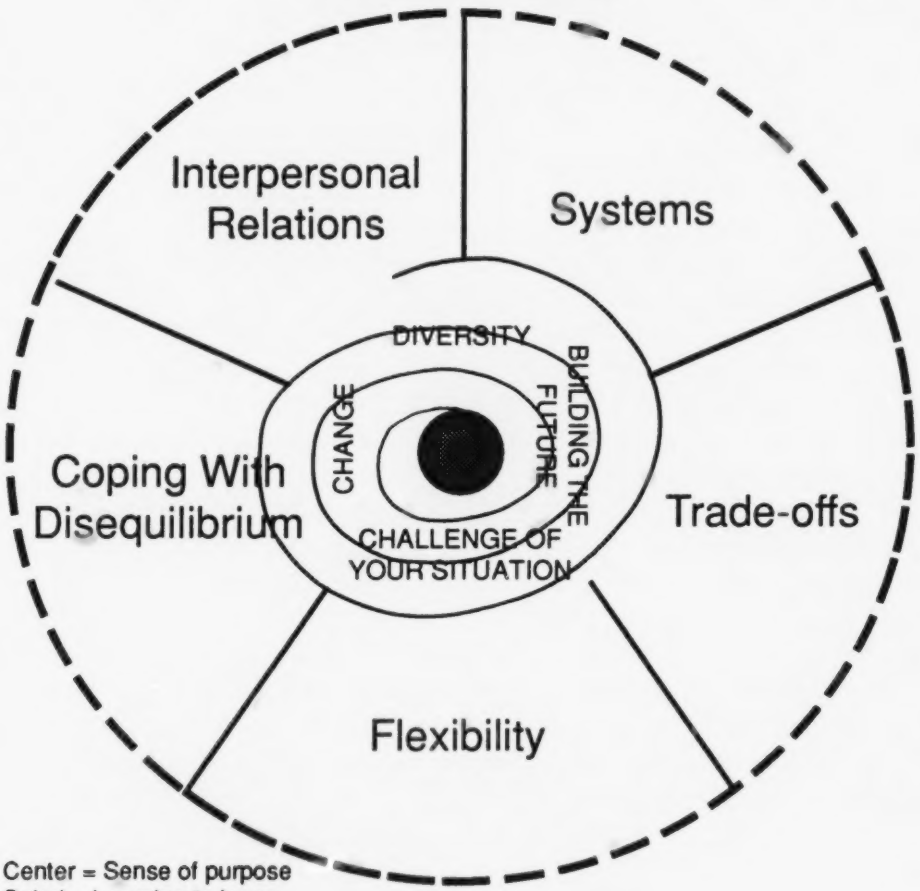
We view goals as mileposts along the way, and strategies as maps on how to get there. In the final analysis, it is with the clarity of one's sense of purpose that leadership improvement begins and ends. In the words of David Campbell (1974), "If you don't know where you're going, you'll probably end up somewhere else." And, clarifying one's own sense of purpose is necessary before you can build a shared sense of purpose.

A Model of Content

We have developed an integrative model for all the above content (see figure). Note that the sense of purpose is at the center, as the central point of the leader's actions. It is in the guts of the person—where we usually locate the will to action. The spiral symbolizes the ongoing daily commitment to learning from one's own experience, as well as the fact that the ideals embodied in the sense of purpose must be carried out in the real world; it also symbolizes that this is an iterative interactive process within which the future is built out of the present, and the present is built out of the past. The three challenges (plus the challenge of the individual's situation) are placed around the spiral as a kind of box against which the development process has to push; this also suggests the necessity of paying attention to exactly what one's situation is requiring. Finally, the five competencies are arrayed around the challenges as

the skills that make the challenges yield to the leader's purpose. The lines dividing the five competencies happen to make a rough Star of the Human. Thus we can picture the individual leader standing in the model with arms and legs spread. The final encompassing circle stands for wholeness, and for all the others involved in your situation. It can be expanded to include the whole Earth. In the end it is the act of the individual—pursuing his or her sense of purpose in the daily process of development, focusing on the challenges and requirements of his or her specific situation, practicing the five competencies, and seeking to bring about a better future for the benefit of all, that meets the challenges of today and builds the future.[1]

LeaderLab® Model



Center = Sense of purpose
Spiral = Learning to learn

Program Structure

Thus far we have described what we think the purpose, underlying training principles, and content of a new generation of management-development programs should be. But what would such a program look like? How would it be structured? In our view, it must have the following basic elements.

Multiple Sessions

To create lasting behavioral change, a one-time course is not likely to be sufficient. We think a course composed of session-break-session approach is best. For instance, in LeaderLab we begin with a six-day session, where among other things participants develop an action plan to improve their leadership. A three-month interval then follows, during which the participant carries out the plan. Then they return for a second session, which covers four more days. During this time they review how the action plan progressed, modify it based on their experiences, and set up the next three-month plan.

Some examples of action plans, which are developed at the end of the first week of the program, are: "I will express my convictions in a more honest and forthright manner" (interpersonal level); "I will help my unit come to terms with its changing role in the organization" (group level); "I will work with personnel to change the bonus system from individual-based rewards to team-based rewards" (systems level). Most participants work at each of the three levels indicated here, and specific short-term goals and behaviors necessary to complete the action plan are set.

Pre- and Postcourse Contact

The investigation of what one's leadership situation requires begins with a precourse packet that provides the participant with the means to do an in-depth analysis of his or her current situation.

For LeaderLab this packet includes a brief videotape about the program and an assessment kit (containing an assortment of qualitative analyses of their sense of purpose, work situation, and life experiences to date, as well as self-plus-observer feedback instruments). A camera is also included so that participants can capture visually the situation they'll be developing action plans around during the week. These materials are sent to the participants eight weeks prior to the first program and are followed by a telephone conversation with the Process Advisor who will work with the individual over the months ahead.

Process Advisor

One way to achieve intervention over time, and to allow a tailoring of the program to the individual's situation, is the establishment of what we call a Process Advisor. This person is a staff professional who meets with the participant during both the first and second weeks of the training to help construct the action plan, and also contacts the participant monthly by phone during the three months back at the work site and for three more months after the second session.

A program that asks participants to look at their leadership situations and to take action—perhaps to take actions that are not necessarily the most comfortable behavior for them—requires a support mechanism to help foster and reinforce the lasting behavioral changes.

The role of Process Advisor is one of coach, advisor, friend, cop, advocate, and behavioral scientist. This person must continually prod and encourage the participant to move ahead, to address issues and blocks, to understand how blocks get in the way, and to help in strategizing ways to remove blocks or confront them.

The Process Advisor meets with his client in two distinct ways: by telephone and in person at the course.

By telephone. From an early telephone greeting and welcome to the program to monthly telephone discussions, the Process Advisor is linked to the participant throughout the program.

Following the first program training week, the Process Advisor talks with his or her participant once a month during the interval between sessions. The purpose of each call is to monitor progress as well as troubleshoot when there appears to have been little progress made. The process is aided by the participant writing in a daily learning journal and forwarding this to the Process Advisor prior to each telephone session.

The second part of the program training is also followed by monthly review of the journal and telephone contact, the role of Process Advisor again being one of troubleshooting, analyzing, and guiding the process forward.

At the course. During the first training session the Process Advisors meet with their assigned participants as a group on the first day and individually later in the week. At the one-and-one-half-hour individual meetings they act as a resource to help participants identify the leadership improvements they wish to make and the actions they might take to bring these about. Prior to each individual meeting, the Process Advisor reviews the set of subjective and objective assessments the participant has completed.

The second program session provides an opportunity for the Process Advisor to meet in a group with the three participants he or she has been working with. Through a facilitative process, each individual presents an account of successes and detours and an analysis of the total experience to date. The group evaluates major learnings for presentation to all program participants.

Change Partners

The task for each participant in this program is to create and follow through on an action plan for his or her leadership situation. That plan can be thought of as the top of a three-legged table. The Process Advisor provides one of the legs, and the other two are in-course change partners and back-home change partners. The group of in-class change partners provides a means for participants to practice the involvement of others in their leadership improvement process. By practicing these behaviors in the program, they are better able to carry them out back home.

In LeaderLab, a three-person, in-course group works together throughout the entire program. These groups are made as diverse as possible, so that participants must learn how to work with people who are different from them. As the program evolves, the groups usually become a network of support for its members, and members often use one another as a resource as they work through their action plans during the three months back home.

Each participant must also establish a group of change partners back in his or her organization during the interval between sessions. To be successful, we think the participant must find three things back home: encouragement (someone to commiserate with and prod them); wisdom (someone who had been through the changes similar to what the participant is attempting and who knows their local situation); and truth (someone who will give them an honest assessment of the impact of their changes). Each participant is encouraged to go back to the work site and seek individuals to work with him on his or her leadership improvement. Since no one person usually can provide all three things needed, the participant works with three or four people, getting at least one thing from each of them. This is often a difficult task, and the Process Advisor tries to help the participant with it during the three-month interval between sessions.

It is up to the participant whether his or her supervisor is included as one of the change partners. Ideally, that person should take part, but the program recognizes that not all supervisors are helpful and that the participants are the best judge of their supervisors' potential contribution to their efforts to change behaviors.

Diversity of Participants and Trainers

We believe it is essential that there be diversity in the participants and the training team, since diversity is one of the challenges of the future. The most effective way of dealing with diversity is not talking about it but rather living it. The classroom composition therefore should be a mix of gender, ethnic groups, and work situations (that is, there should be representatives from both the profit and nonprofit worlds, and representatives from educa-

tional, military, medical, and corporate organizations). The training team, to the extent possible, should have a similar diversity.

Classroom Activities

Classroom activities can take many forms. A fundamental one, of course, is the lecture. It is essential that lectures in this type of program be crisp, that they never lose sight of the need for action. In addition to lectures, there are a number of other forms that we think are appropriate, including discussions, exercises, simulations, and special classes.

Discussions. Discussions are important because they draw participants into the material and allow them to begin adding their understanding to it. Equally important, they allow participants to bring their experience and expertise to one another. For example, discussions involving case studies, exercises, or assessment instruments promote a cross-fertilization of ideas, confirm to participants they are not alone in addressing what their situations call for, and offer a way for them to review, assess, and take action in their situations.

Exercises. Exercises serve as the first safe place that new ideas and behaviors can be put into practice. They are valuable not only because they give people a deeper, more personalized intellectual grasp of what is being studied than lectures and discussions but also because they make it possible for them to experience what it feels like to do a new behavior. Exercises also provide useful data for peer discussion and feedback.

Simulations. A simulation is actually an extended exercise. In fact, in LeaderLab we refer to these as *simmercizes*, and we begin the program with one called "World Products International." WPI is a three-hour activity that puts participants into the organizational roles of this fictional company. They must deal with rapid change, capital allocations, diverse groups, and environmental and community issues, and they must wrestle with the values of the various divisions of the corporation, as well as with the values of the individuals involved.

Special classes. A leader uses more than rational intelligence and the meanings of words. The tone of voice and body lan-

guage—even the gestures he or she chooses to use or not use—come into play. Thus, participants must, as Peter Vaill (1989) points out, look at their leadership as a performing art. We think, therefore, that working classes on how to act are appropriate for this type of program.

In LeaderLab, we have acting classes instructed by a person who is an actor, director, and producer in the local theater community. The instructor provides personal assessments based upon observation and assessment of each participant's actions during the opening simulation. Frequently, an individual is unaware that he or she uses a certain gesture or behavior when confronted with a particular situation. This analysis of each individual's actions takes into account what he or she typically tends to do, and suggestions are made about new behaviors that would make the participant more effective. For instance, one participant was undemonstrative in group settings, usually sitting quietly and taking up as little space as possible. The instructor gave him a "suggesture" (suggested gesture), telling him to try putting his elbows on the table in order to take up more physical space. On returning to LeaderLab for the second session, he noted that this behavior had been helpful. He told of a meeting in which it would be decided whether to continue his group or to combine with another. "I put my elbows on the table, I spread out all my stuff, and I effectively commanded the entire meeting."

Other special classes can help participants go beyond talk and mere intellectualization. In LeaderLab there is a session in which participants do "three-dimensional problem-solving." This technique is valuable in helping participants envision and plan back-home leadership actions. Working with an issue or situation that has caused difficulties back home—perhaps the dual pressures of long workdays and heavy family demands, or coping with a difficult boss and change-resistant subordinates—the participant uses his or her classmates to stage a scenario. For instance, one woman sat in a chair in the middle of the room. She had a person, who represented her seven-year-old child, sit at her feet and say, "Read me a story, Mommy." She had another person, representing her boss, stand behind her, point a finger, and say, "You have to get all the work done." A third person, who represented her subordinates, stood beside her and said, "We can't get it all done." There were

other figures in the scenario as well. When prompted to change the scene in order to effectively resolve it, she placed the child in her lap, had her boss place a comforting hand on her shoulder and ask how he could help, and had the subordinate ask how the work problem could be addressed. Through this exercise the participant learned that she was being overly passive in the situation and that she needed to approach her boss and ask for help, to allow herself to go home at night and read to her child, and to deal directly with her subordinates. Thus, the exercise was part of a process that enabled her to empower herself to make changes in her leadership role.

Another class that LeaderLab employs involves art techniques. Frequently, being in a management position develops one's ability to intellectualize and verbalize, but the use of other methods of expression is neglected. Art helps participants express themselves more richly. In one class the participant draws with pastel chalks to communicate a particular situation in his or her life. In another, the participant is given a small group of objects such as leaves, stones, wire, and string and asked to create a sculpture that communicates the change process that he or she is undergoing. An artist is in residence to facilitate the artistic process.

Instruments

In selecting the instruments for use in this type of program, we felt it important to find tools that not only provide an awareness of strengths and needs but also help participants recognize any blocks they may have. Furthermore, the instruments must help each participant take action. For instance, sense-of-purpose and situation audits can help one evaluate how action can be taken in his or her work situation. In LeaderLab we use five instruments—three of which are given to boss, peers, subordinates, or family—to provide data to the participant on strengths and developmental needs, as well as what might block his or her actions. Each of the instruments is worked with in the classroom, and in small groups and individually.

Given the aim of achieving a holistic program that addresses the needs of head, heart, and feet, the instruments are selected as

data points to the various competencies. Each must provide cognitive information on the question, "How am I doing?" Each must deal with how the individual feels about the feedback. And each must raise the issue of action: "What will I do to put this information to good use?"

The primary use of instrumentation in this type of program is to help participants internalize the classroom information so they can put it to use in their own situations. They also provide tangible confirmation of what participants know about themselves, which permits them to move on to the important questions, "How do I change? What actions will I take?"

Conclusion

As important as the structures chosen for this type of program are, it is just as important how the structures are combined. The program components must be mutually supporting. In LeaderLab, for instance, each competency is presented by means of a short lecture, an exercise to put the new information to work, and a discussion and brief assessment or feedback instrument that helps provide a personal, data-based reference point for understanding and processing the information. Also, structural means can be used to reinforce the teaching of competencies. We attempt to emphasize flexibility, for example, by changing the physical layout of the training room daily.

Implications

The first LeaderLab was offered in June 1990. The participant mix was diverse, with men and women of varied ethnic backgrounds from profit and nonprofit organizations. Most had previously attended a feedback-intensive leadership-development program and, therefore, had a good idea of their strengths and weaknesses. It is our belief that people who come to LeaderLab ideally already know a great deal about themselves and are committed to improving. Ages ranged from early thirties to late fifties, predominantly forties and fifties. Most came from an upper-middle-management level in their organizations.

These initial groups had a good experience with the program; the majority reported substantive change in their leadership behaviors and attributed it in some way to the program's influence. (This was backed up in many cases by the people who work with them.) At the time of this writing, five groups have finished their six months of contact with the program, and final analyses of the impact of each program are in progress.

A research effort has been embedded within LeaderLab. Its short-term purpose is to measure the impact of the program in a way that can help improve the program design. Data for all participants are being assessed. This is being supplemented with an in-depth study of selected individuals that includes site visits before, during, and after the program. The long-range goal of the research effort is to gain a better understanding of the overall process of adult development (an effort that is linked to other research being conducted by the Center to clarify how adult development actually occurs).

The process of evaluating leadership-development programs in general, and LeaderLab in particular, involves some difficult questions. Do we evaluate the program on the basis of outcomes or process? How do we determine its effect separately from all the other factors involved in an individual taking effective action? Early indications from the site-visit research is that in addition to the program content and design, two other factors significantly affect whether an individual takes more effective action: first, whether

one's local situation is in rapid change or is more or less stable (external pressure for change), and second, whether the individual is ready to develop (internal pressure for change). Although this seems obvious once it is said, it is confirming, research-based insights like this that will eventually provide the key to improving human-development programs and processes. Program evaluation is currently poorly understood in our industry, and the Center is attempting to coordinate an effort to improve it (a conference on "Learning from Experience" was hosted by the Center in the summer of 1990).

An evolving aspect of our program is how we view leadership. As discussed above in the section on operationalism, *leadership* is too abstract a concept to be put easily into practice. The concept of *leading* gets more at what we are trying to develop. Everyone leads now and then, and leading is an activity that has a relationship to the immediate situation and people. It is an activity that anyone can participate in: In fact, it is ideal if the individual with the most knowledge and inclination at the moment would lead the others, at the moment, towards the shared goal.

Leading in itself, however, is not enough. The challenges of our times require that we lead creatively. Leading creatively has to do with something beyond just meeting the situational needs of the moment; it also involves developing both oneself and others by the way it is done, and it includes bringing about something new, renewing the organization. Finally, it assumes movement toward a goal that benefits all. Leading creatively is something that all people can do. Developing the ability to lead creatively can thus lead to the widest application of leadership. It can help bring about a livable future.

The twenty-first century presents us with awesome challenges. We feel in some ways as if humanity stands at the brink. How do we develop the courage and creativity to meet the challenges that face us? Will we find a way to live with each other's differences? Will we be able to handle accelerating change? Will we be capable of building the future with a shared sense of purpose? Who will stand up to lead us in the necessary tasks towards goals that benefit us all? How can we develop the capacity for leading as broadly as possible? The times demand that we construct leadership-development programs that focus on the next step after assessment and self-

understanding: taking more effective actions in our particular situations, and learning how to continue our development process on our own. The LeaderLab program is currently one answer to this development challenge. It exists primarily as a question, more than an answer: "How *do* we encourage and enable people to lead more effectively in their situations?" As we strive to find ever-more-effective answers to this question, we welcome and invite others working towards this same goal to contact us to combine our efforts to bring about development programs that can help shape the leadership required for the next century.

Note

[1]You may have noticed in the review of content that there are many tensions present in this kind of program. One tension is that we teach a model for effective leadership—that the participant should learn the five competencies, plus learn to learn from experience and develop a sense of purpose—and at the same time we teach that participants should forget the model and move into action under whatever model works for each as an individual. Our hope is that by the end of the six-month program, the individual will have created more or less consciously a personalized model of how he or she should develop as a leader.

Another tension in the program is that despite a focus on action, we think participants need to work with a large amount of intensive feedback from home as a basis for identifying the few things they want to move on. Perhaps the primary paradox of this kind of program is that it must set up the expectation for *outcomes*—"more effective actions"—while concentrating primarily on helping the participant learn a *process* for achieving more effective actions.

Yet another tension occurs between this kind of program's interest in the generic—for instance, the three challenges and five competencies—and its requiring the individual to identify and work with the specifics of his or her situation as the place for action.

Finally, there is the tension between the sense-of-purpose central dot in the model of content and the learning-from-experience spiral. Clarifying one's sense of purpose is a static activity. Better understanding of it, however, does not necessarily lead to more effective leadership action. This requires practice and risk-taking and learning from the trials of experience. Likewise, doing a lot of activity and experimentation in learning from one's experience in itself does not necessarily lead to more effective leadership actions. It must have the focusing power of a clear sense of purpose to guide it. We believe these tensions are appropriate and reflect the realities involved in the effort to improve leadership behaviors.

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We accomplish our mission through research, training, and publication—with emphasis on the widespread, innovative application of the behavioral sciences to the challenges facing the leaders of today and tomorrow.

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Our work should serve society. We expect our work to make a difference in the quality of leadership in the world. To that end, we try to discover what is most important to do, and focus our resources for the greatest, most enduring benefit. In doing this we continually remind ourselves of the inherent worth of all people. We consider it our responsibility to be attentive to the unique needs of leaders who are women or members of minorities. To make a difference in the world and to turn ideas into action, we must be pioneers in our field, contributors of knowledge, creators of solutions, explorers of ideas, and risk-takers in behalf of society.

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